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Volume

1

NATIONAL GUARD YOUTH CHALLENGE PROGRAM

Cadet Tacking Database Operations Manual

Cadet Tracking Database Operations Manual

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Section

1

Introduction to the Database

The Cadet Tracking Database is designed to retain all pertinent data for all ChalleNGe Program cadets from the application phase to the completion of the Post Residential phase. The data base is set up so that each individual program will be able to tailor the data to their site specific needs. This user manual will guide you through the initial setup process of the database, data entry, and report building.

Overview of the Database

Welcome to the National Guard Youth ChalleNGe Program's Cadet Tacking Database. The database is a Microsoft Access™-based data management and reporting system that is designed specifically for the National Guard Youth ChalleNGe program. The database serves as the central repository for individual State ChalleNGe program data.

The database is designed and implemented based on two primary objectives and requirements at both the National and State levels. The first objective focuses on program requirements and data collection, analysis and reporting at the national level. The second objective of the database is to provide a data management tool designed to assist Program Directors in the management of their individuals programs.

The database identifies two types of fields for data entry: Required and Non-required. Required data fields are those data variables that MUST be entered based on guidance and direction from NGB. This data is used for evaluation of and reporting on individual and overall program performance… Non-required data fields are fields that have been added to the system based on individual program requests and enhance the system's capability as a management tool for the individual programs.

The Cadet Tracking Database security is the responsibility of the IT administrator for each specific site. The databases are not interconnected between different programs nor should they be.

Database Navigation

This section will highlight the basics of working within the database from navigation to common commands which may help to efficiently add data and produce reports of information. The database is set up to allow you to tab between the different fields on a page in order to speed data entry and improve functionality. The arrow keys also allow you to navigate through the database. A combination of keystrokes and mouse clicks are needed in order to completely navigate the database. As you spend time working within the database you will begin to find the combination of these which is most efficient for you.

Common Terms[i]

This is a list of common terms related to the database that can be referenced when there is a question as to what the manual is referring too. The index at the end of this manual also is a useful tool if you come across a term that you do no fully understand.

Criteria - Criteria are specifications that you want matched when you are searching for or querying records. You specify criteria by using comparison operators.

Field - A field is a single category of information, such as a phone number, product name, or unit cost, relevant to the entire set of data. Fields of data are the columns in Access tables.

Filter - A filter is a feature that provides a quick way to select and view designated records.

Form - A form is a feature that shows only the information you want to see, in the order you want to see it. A form is used to view data in a database, enter new data into the database, or edit data. Forms are based on tables or queries and data updated using a form is also updated in the table or query.

Import - Importing is the process of bringing in data from another file, spreadsheet or database (including non-Access databases). Access has an Import Wizard to automate the process of importing data into an Access database.

Macro - A macro is an action or set of actions used to automate a series of tasks.
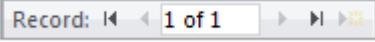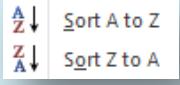
Navigation Buttons - Navigation buttons are a group of five buttons located at the bottom of a table, query, form, report, or data access page used to move to other records or pages within the object.

Query - A database object that can be used to view, change, and analyze data in different ways; essentially, it is a question that you ask about the data in your table(s).

Record - A record is all of the information collected about a specific event, thing, product, or person. A record consists of as many fields as are in the table or query.

Report - A report is a database object used to view and print selected information from a table or query in a customized format. A report differs from a form because it does not allow you to make any modifications or edits to the actual data.

Common icons

	Database file icons.
	Allows you to edit information.
GO	Perform a designated command.
Record: ◄ 1 of 1 ► ►◄	Allows you to switch between different records.
A↓ Sort A to Z Z↓ Sort Z to A	Sort options when you right click on certain fields.
►	Click to select the adjacent record.
▼	Allows you to choose preselected options in a form.

	Click to select/deselect criteria which enables/disables a flag.
	Allows you to copy data from certain fields to others.
Filtered	Filters or removes the filter on a specific form.
	Click on this icon to open the calendar and select a date.

Installing the Front End and Back End

1. Download the provided NGCA.accde and NGCA_Data.accdb to your computer. (Figure 1).
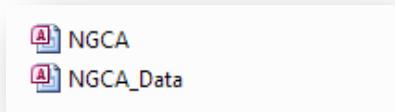
Figure 1

2. On the network, create a shared folder labeled "**Cadet Tracking**" (Figure 2). (The shared folder requires a minimum of read/write access for users in order to work properly)
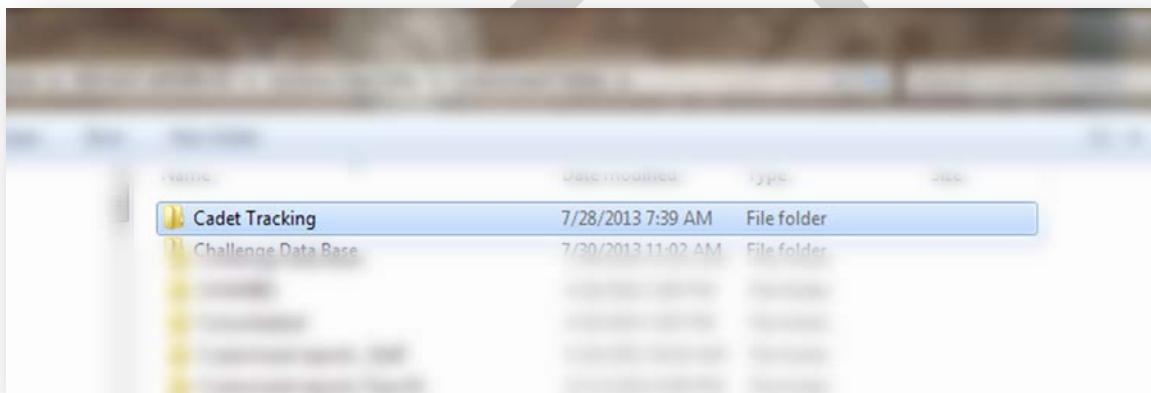
Figure 2

3. In the **Cadet Tracking** folder create two folders, label the first folder "**Backend**" and label the second folder "**Frontend**" (Figure 3).
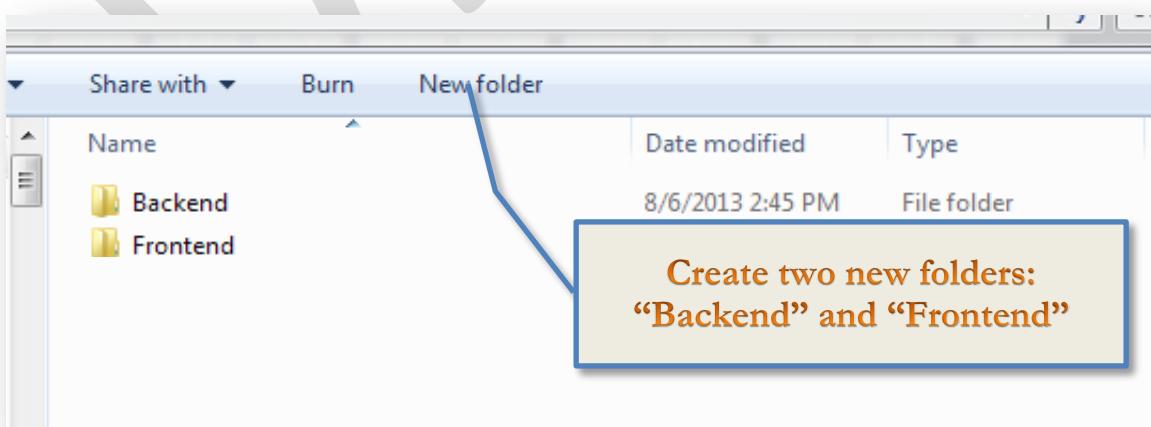
Figure 3

4. Move the file named "**NGCA.accde**" to the folder labeled **Frontend**. Move the file named "**NGCA_Data.accdb**" to the folder labeled **Backend** (Figure 4).
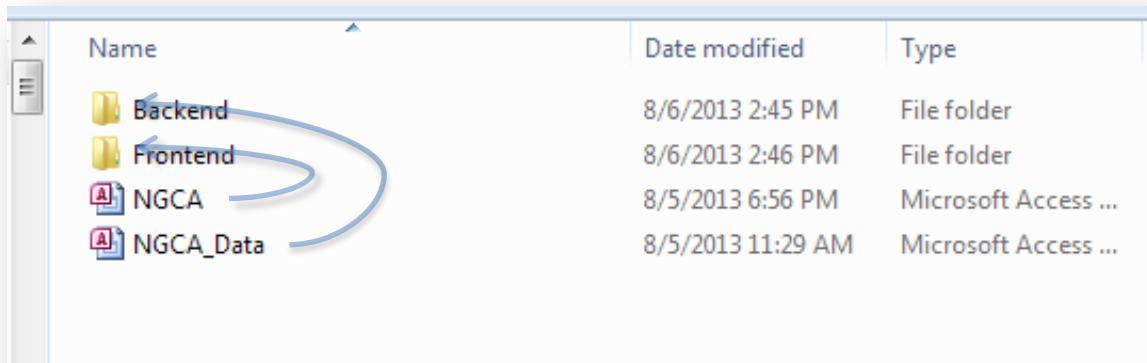
<div align="right">**Figure 4**</div>

5. Open the folder labeled **Frontend** and double click on the file named **NGCA.accde** (Figure 5).
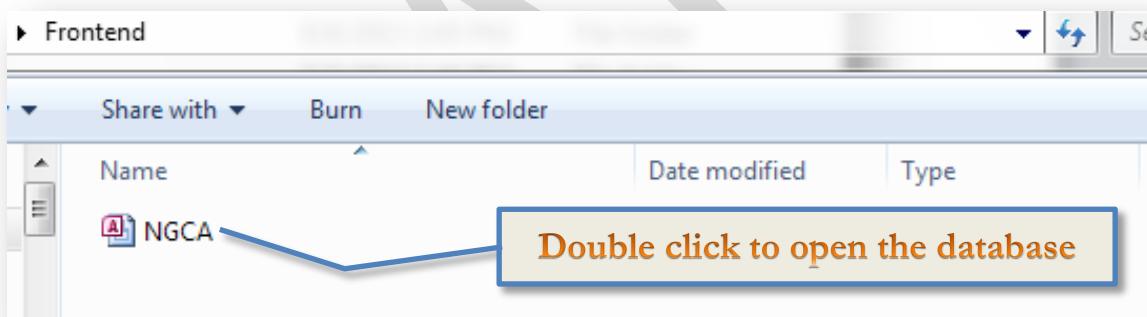
<div align="right">**Figure 5**</div>

6. When you open the database you may see the following prompt. If so click on the "**Stop All Macros**" button (Figure 6).

<div align="right">**Figure 6**</div>

7. If prompted you will need to click on "**Enable Content**" (Figure 7). (This prompt may also read "Choose Details")
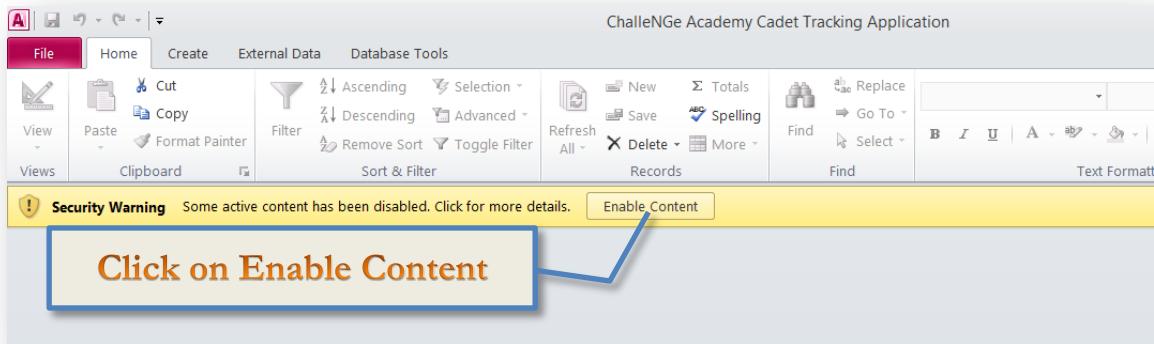
Figure 7

8. You may also see the following message. If you do click "**Yes**" (Figure 8).
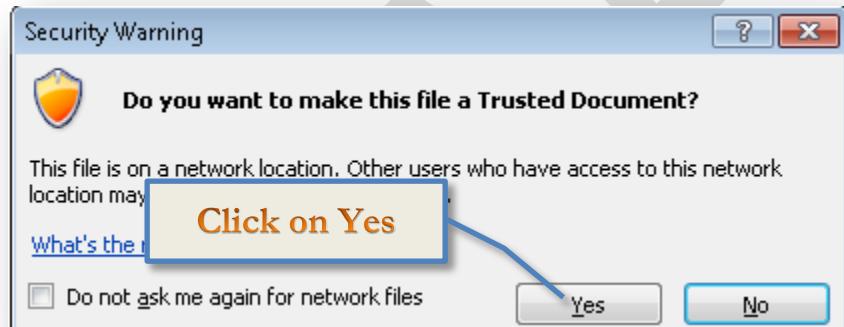
Figure 8

9. The first time you set up the Frontend and each time you receive a new Frontend database, you will have to update where the backend database resides so that the functionality can be linked to your data. When prompted click "**OK**" (Figure 9).
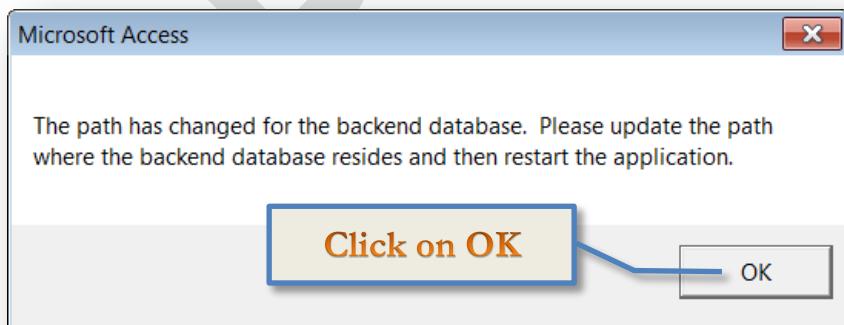
Figure 9

10. Click on the folder icon to navigate to where you have the Backend folder located on the server (Figure 10).
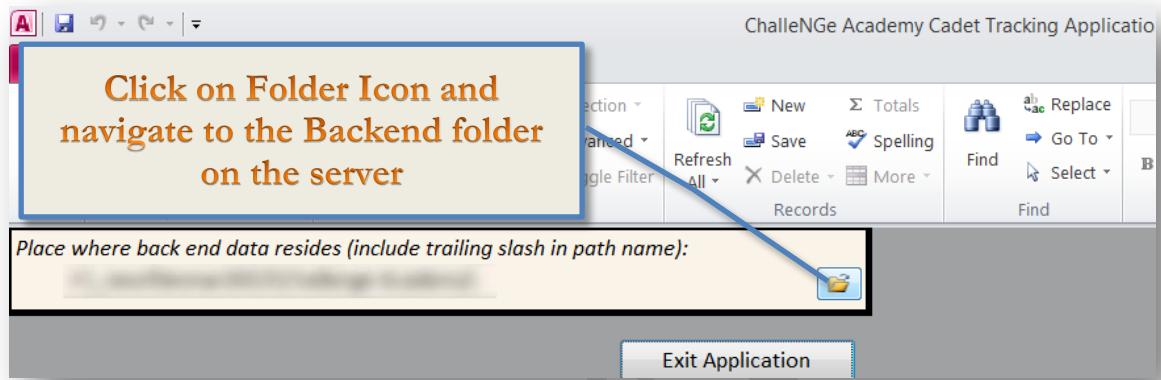
Figure 10

11. Select **NGCA_Data.accdb** in the **Backend** folder (Figure 11).
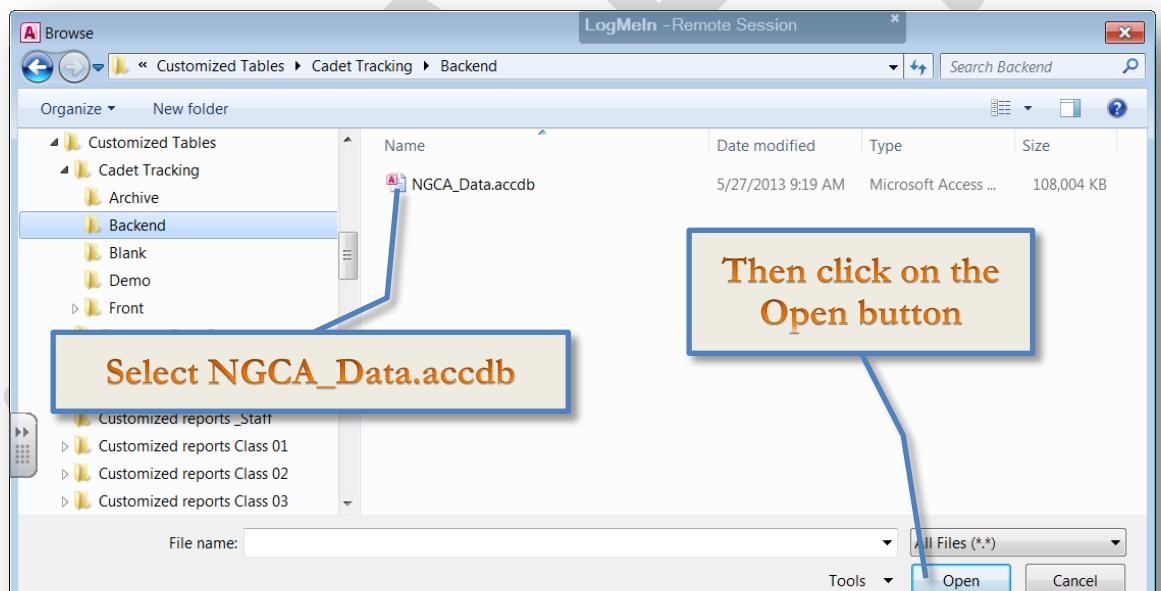
Figure 11

12. You will now need to close the application and re-open it. Click on the "**Exit Application**" button to close the program. Then re-open the Frontend to continue (Figure 12).

This path now should be the same as the location of the backend (NGCA_Data.accdb)

Place where back end data resides (include trailing slash in path name):
J:_newfilesmar2012\Challenge Academy\

Exit the application

Exit Application
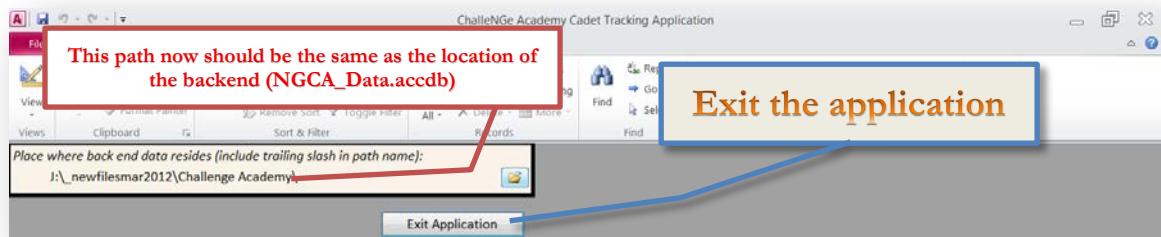
Figure 12

IT Admins- Once you have placed the files in shared folders and linked the Frontend to Backend, have each user **copy** the front end to their desktop.

Users may have to initially stop macros and enable content but the linkage is already completed. Users must be mapped to the shared folder where the back end resides.

Templates

See Appendix 1

If templates are used do not enter the same information as is entered on the template for Site Set-up.

Site Set-up

1. When the application opens for the first time, it should look similar to the image below. This screen will be configured based on your site's information and a site logo of your choice. Click on the pencil icon to begin (Figure 13). (You can also access the Site Set-up page by clicking the "Admin" button and then clicking the "Site Set-up" button)
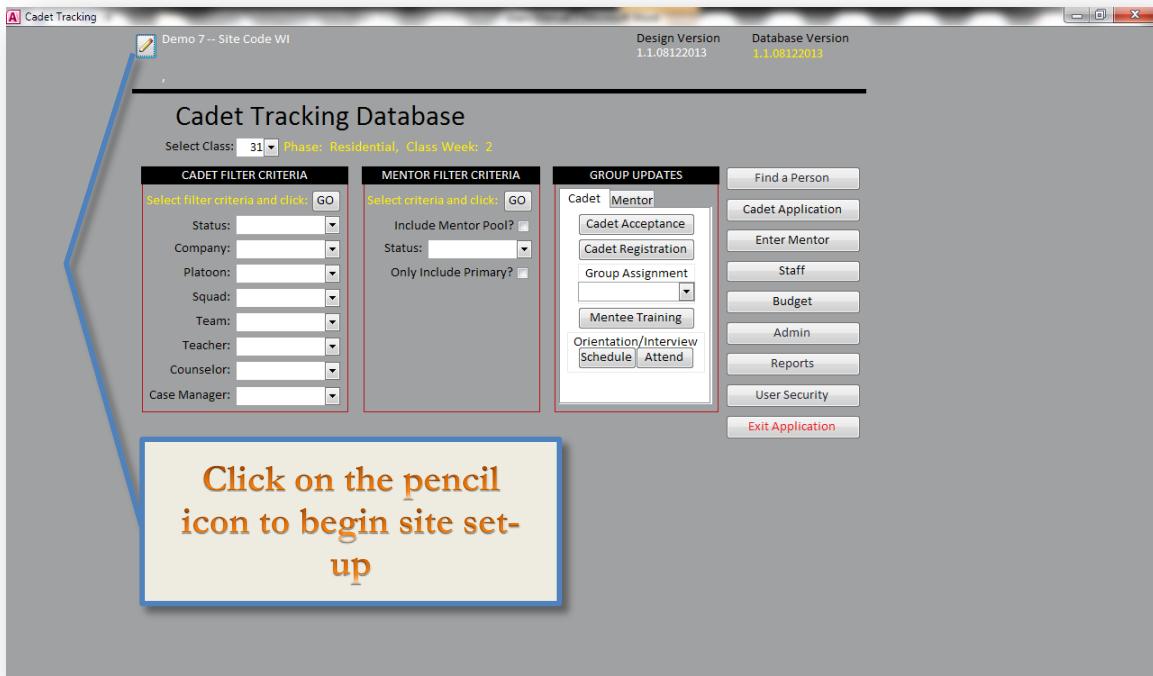
Figure 13

2. This is the Site Set-up screen. On this screen you will enter the information that is specific to your particular site. Start by entering your site **Name** and **Code** (Figure 14).

Figure 14

3. Now enter your site **address**, **phone**, and **fax** number (Figure 15).

Enter your site Address, Phone, and Fax

Figure 15

4. Enter your site specific information in the provided fields (Figure 16). (The chosen logo will appear in the box below the site logo name, in the upper left corner of the main menu and in the header of all reports generated from the application)

Enter your site specific information

Click on the folder icon to choose your organizations logo

Figure 16

5. Once all edits have been made to the site specific page click on the "**Close Form**" button to go back to the main screen (Figure 17).

Class Set-up

1. Click on the "**Admin**" button to open the class set-up form (Figure 18).
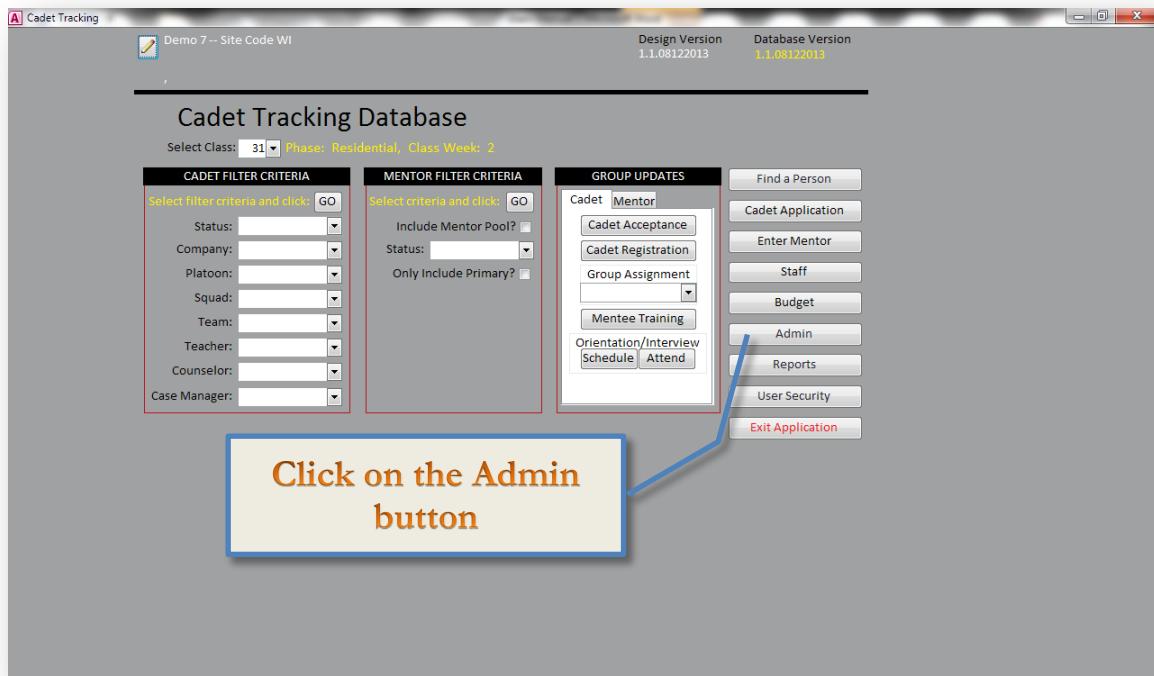
2. This is what the Admin page should look similar to (Figure 19).

(All buttons on this screen access forms that provide lookup values in pull-down fields. Most lookup fields are shipped with a few sample values for illustrative purposes. They can be maintained by any user whose security level includes the privilege 'Admin Menu – View/Edit', which you will learn about later in this document.)

3. Click on the "**Class Setup**" button (Figure 20).

Click on the Class Set-up button

4. Enter information in the provided fields to set up the class data (Figure 21). Other application functions rely on existence of data in the following fields:

    (Notice that these fields are highlighted on the form. These fields are mandatory entries.)

    Your site's class number   **Class start date**

    Class year   **Challenge start date**

    Cycle   **Graduation date**

    Class Phase *(select from the pull-down) *these*   **Post-Residential completion date**
    will be automatically updated going forward based
    on date-driven metrics

The fields highlighted are current required entries.   Double-click in a date field to access the calendar.

Class	NGB	Class Yr	Cycle	Class Phase	FY	FY Start	START DATES Class	Challenge	Graduation	PR Comp.	# of Days	Target Grads	Case Mgrs	Grading Period	Cost / Bg Chk	Website
31	41	2013	1	Residential			7/25/2013	8/9/2013	12/14/2013	12/14/2014	141					
32	42	2014	2	Application			1/16/2014	1/31/2014	6/14/2014	6/15/2015	148					
33	43	2014	1	Application			7/24/2014	8/8/2014	12/20/2014	12/20/2015	148					

Add Class   Close Form

Record: 1 of 3   No Filter   Search

5. Enter class details for different classes... (Note: Classes imported by templates should not be entered here. This information is on the template.)

6. Once you have completed adding the classes, click on the **Close Form** button (Figure 22).

Figure 22

User Security

Changes to these settings limit what certain users have access into on the database. It is important to be thorough as you set the security settings to fit the needs of your organization. The default super-user has full access to the program and should be used first to make the initial security settings. It is important that you set up a new super user account or change the password to the poc account to prevent unwanted changes to your system.

1. From the Main menu click on the **User Security** button (Figure 23).
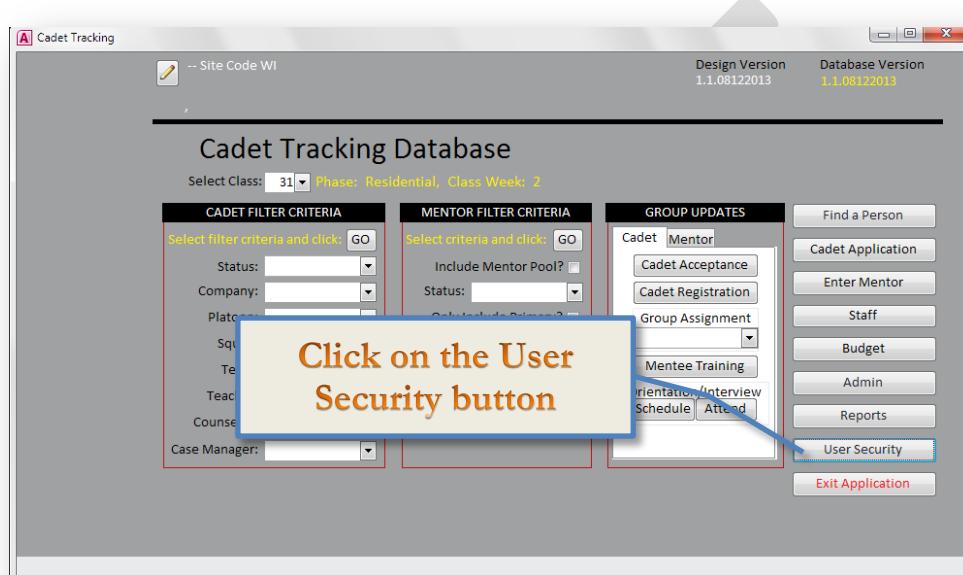
Figure 23

2. Change the default Login and Password from poc/poc for your site specific IT login and password into the program. (Figure 24).   Example - Login: admin Password: security.

    Make sure that you keep this information and that superuser is checked.
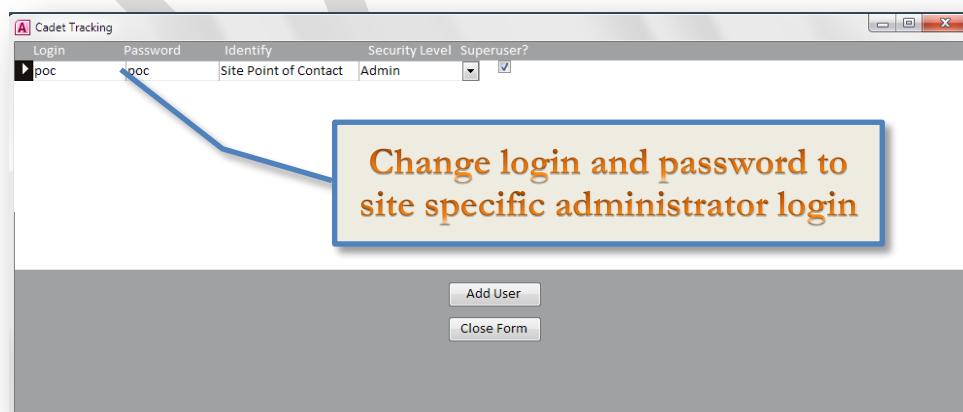
Figure 24

3. Once the superuser is set up you can begin to add personnel to enable access to the database based on different user credentials and requirements. To do this, click on **Add User** (Figure 25). Enter user details: login name, password, full name, security level, and then check the box if this will be a superuser.

You have the ability to add individual login and password information for each member of the staff and then set their permissions based on a grouping labeled "security level" for the position that they hold. Note that you can set up department login information as well as individual personnel login information as desired.

Figure 25

4. There are standard preset security levels which can be used for basic user setups (Figure 26). These presets allow for quick setup of pre-selected program needs or the ability to set up to 10 custom security levels. Here is the list of security level's which can be used:

Admin	Reports	Custom4	Custom9
Admissions	Teacher	Custom5	Custom1
Cadre	Custom1	Custom6	
Case Mgr	Custom2	Custom7	
Counselor	Custom3	Custom8	
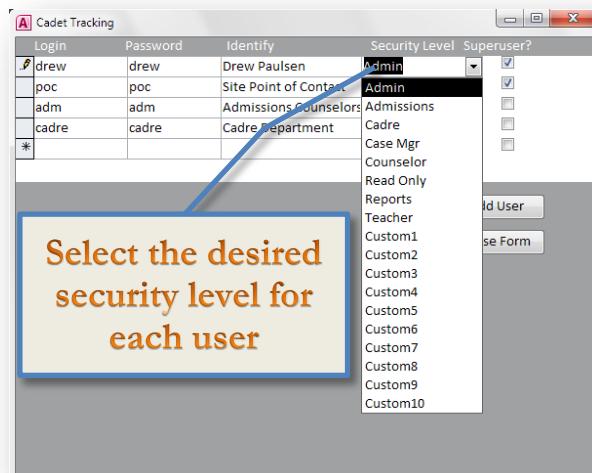
Figure 26

5. If you click on a security level for any login you will see a sub-form that allows you to adjust the security settings for that individual login (Figure 27). If the user being added is a superuser no individual privileges can be set as full access is granted. If no permission is added, the default is Read Only, excluding SSN, Medical Tab, and Counselor Notes.
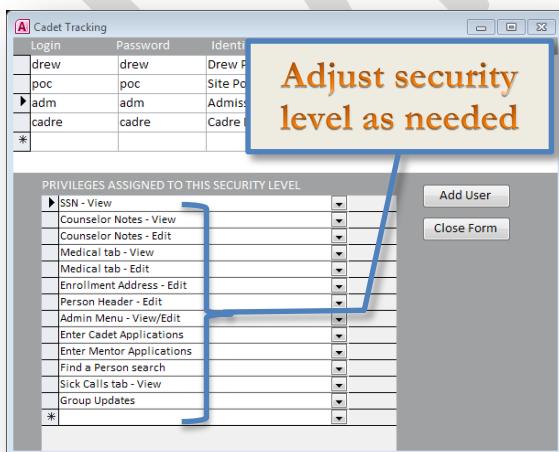
Figure 27

6. Table 1 is a list of all of the sub-form security options which can be set for each login.

Privilege	Description	Application
SSN – View	Can view the SSN	For privacy, this information can be made visible only to the security levels where it is assigned. The SSN appears in the 'person' header
Counselor Notes – View	Can view counselor notes	The counselor notes exist on the 'Counselor Notes' sub-tab of the 'Residential' tab on the class detail screen. This privilege makes them visible.
Counselor Notes – Edit	Can edit counselor notes	The counselor notes exist on the 'Counselor Notes' sub-tab of the 'Residential' tab on the class detail screen. This privilege makes them editable.
Medical tab – View	Can view medical tab data	Medical information such as sick calls, drug abuse and immunizations exist on the 'Medical' tab on the class detail screen. This privilege makes them visible.
Medical tab – Edit	Can edit medical tab data	Medical information such as sick calls, drug abuse and immunizations exist on the 'Medical' tab on the class detail screen. This privilege makes them editable.
Enrollment Address – Edit	Can edit enrollment address	The enrollment address is on the 'Enrollment' tab of the class detail screen and the accurate address is keyed to matching corresponding legislators for reporting. This privilege allows for a user to update what admissions entered originally.
Person Header – Edit	Can edit person header	The person header is visible at the top of every class detail page and gives basic info on every person. Although most information would not change (birth date, SSN, etc.) the current physical and mailing address could change, as could the Date of Death when a cadet is deceased. This privilege makes person header data editable.
Budget Module – View	Can view budget module	This function is not currently used, but this privilege makes the Budget button on the main menu visible.
Reports Menu – View	Can view reports	This privilege makes the 'Reports' button on the main menu visible.
Admin Menu	Can view/edit admin (pulldown)	This privilege makes the 'Admin' button on the main menu visible.

– View	lookups	
Staff Menu – View/Edit	Can view/edit staff data	This privilege makes the 'Staff' button on the main menu visible.
Group Updates	Can perform group updates	Group Updates is the process whereby multiple cadets can be updated at the same time. This privilege would allow group updates to be performed.
Enter Cadet Application	Can enter cadet application	This privilege makes the 'Enter Cadet Application' button on the main menu visible.
Enter Mentor Application	Can enter mentor application	This privilege makes the 'Enter Mentor Application' button on the main menu visible.
Find a Person Search	Can search for any cadet/mentor/guardian/staff	This privilege makes the 'Find a Person' button on the main menu visible.

Table 1

7. Once you are done setting user security settings click on the **Close Form** button to return to the main menu (Figure 28).
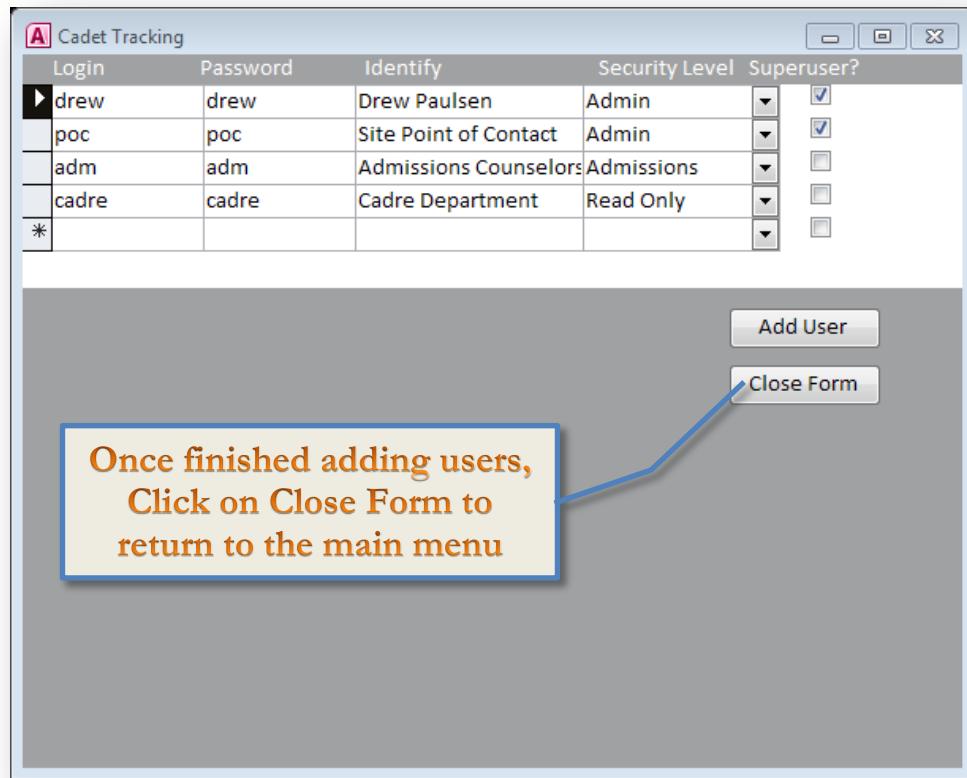
Figure 28

Staff Entry

In this section we will walk through the process of entering your site specific staffing information.

1. On the main page click on the **Staff** button (Figure 29).
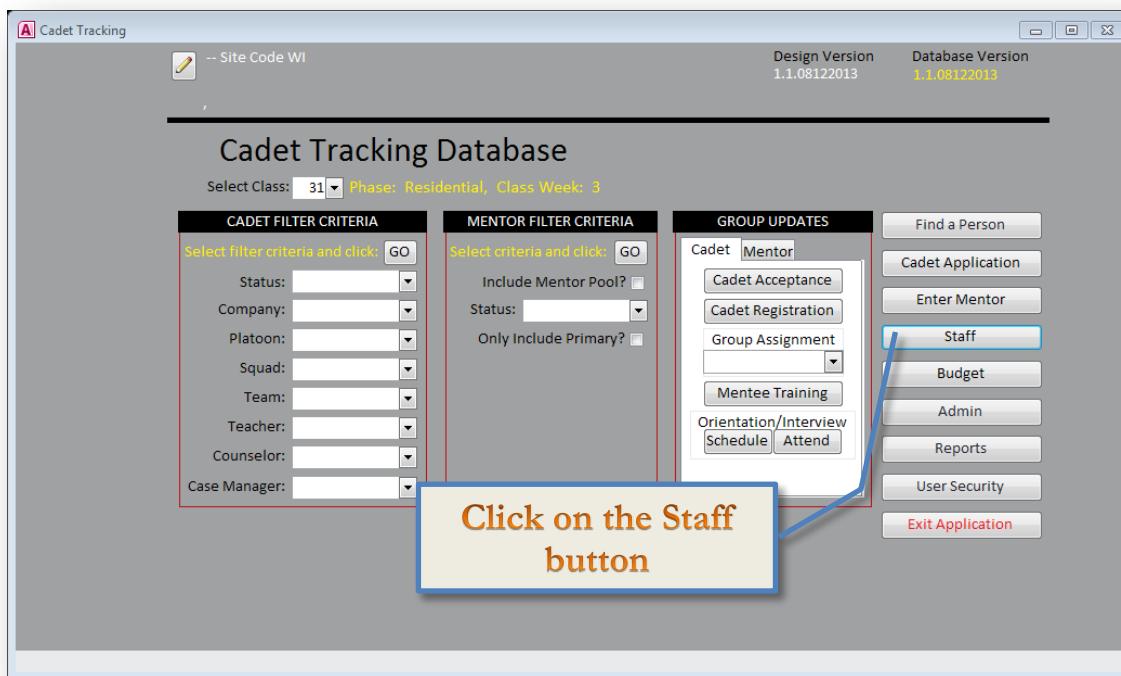
2. From this page you will be able to add new staff as well as filter through staff based on employment type and department (Figure 30).
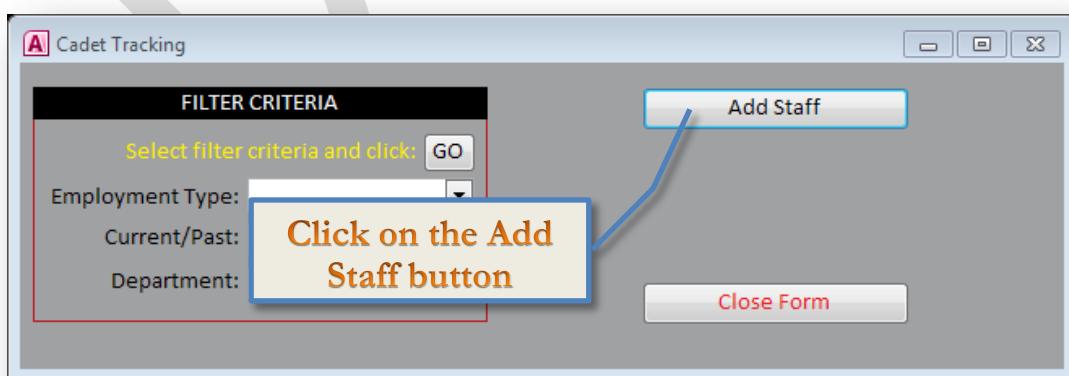
3. Begin by entering the SSN, Last Name, and First. If there is a match in the database do not add the person here but rather go back to the previous record for the individual and update the position designator for that person. At a minimum, enter the Last Name, First, Start Date, and Address (Figure 31).

4. SSN is not a required field for any "people" (Staff, Cadet, Guardian, and Mentor) data. If used, SSN field is searched for previous records.

Figure

5. Continue to add contact information as available (Figure 32).

Figure 32

6. Continue to enter the pertinent location and demographics information (Figure 33). Check the Hispanic checkbox if the staff has indicated that they are of Hispanic Ethnicity. Enter as many Races as apply. Note: When you click on the Field for the Staff Start Date you will have the option to click on the ⊞ icon to select a date.

Figure 33

7. Once you have finished inputting information for the staff member, click on the **Add This Person** button (Figure 34).
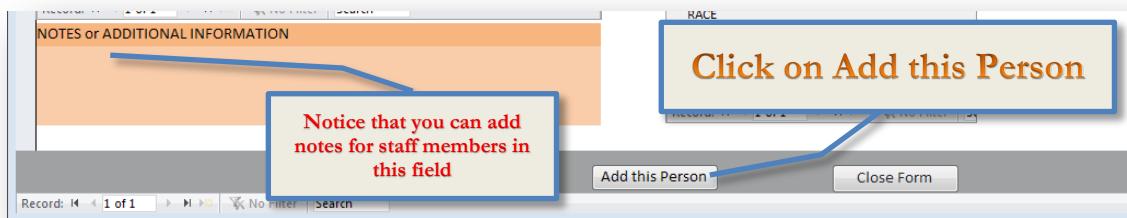
Figure 34

8. Continue to add pertinent information for the staff member (Figure 34).
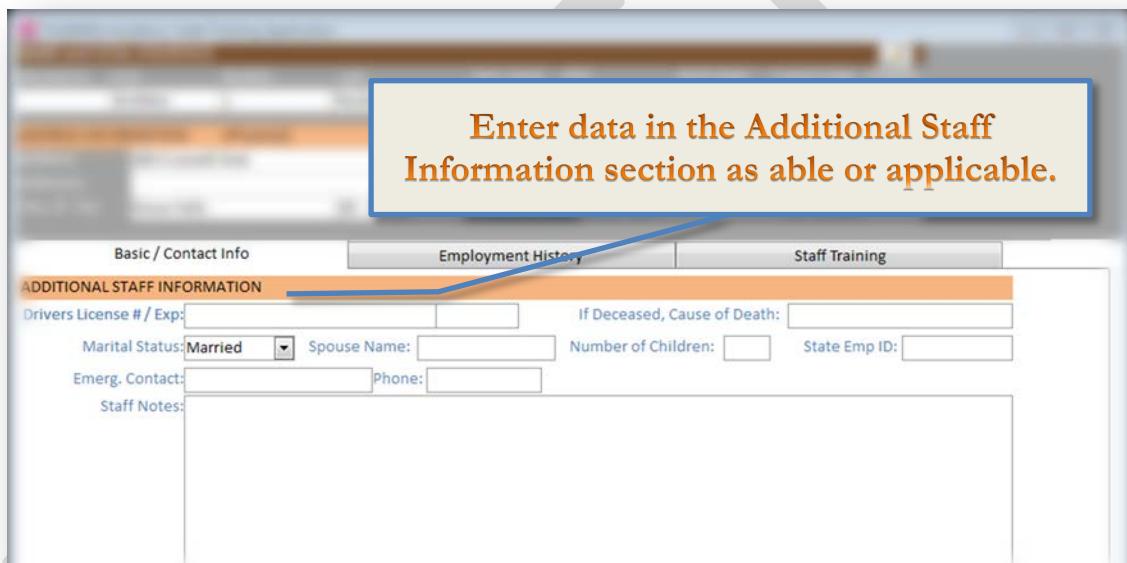
Figure 35

9. Click on the **Employment History** tab. Enter the staff member's **Employment Type** and **Hire Date**. The **Start Date** field will be automatically populated from the record added as a new staff member (Figure 36).

Figure 36

10. Enter the Obj. Code/Pos. from the drop down menu (Figure 37). NOTE: This is a pull down maintained on the admin menu. It is important because it links staff entries to specific pull downs – for list of teachers, case workers, and counselors (Figure 38). Any object code that has 'Teacher' in the third column will be one of the values listed in any teacher selection pull down in the application.

Figure 37

Figure 38

11. Select the Supervisor and the Department from the drop down menus (Figure 39). Until the Supervisor's information have been added they will not be in the drop down menus.

Figure 39

12. The check boxes for **Can be a Case Worker** and **Can be a Supervisor** allow you to override Obj. Code/Pos. to enable staff to perform the related functions (Figure 40).

Figure 40

13. Continue to add any further pertinent information to the **Military** and the **Testing/Evaluation** Dates sections (Figure 41).

Figure 41

14. Once you have finished entering the information for the position you can add other positions that the staff member has held by clicking on the Add Position button. Once you are done adding positions in the employment history, click on the Staff Training tab to enter training that the staff has completed (Figure 42).

Figure 42

15. Use the drop down menus to choose the **Type** of training as well as the **status** of the training. Then continue to input other pertinent information as available (Figure 43). The drop down forms can be modified to fit individual program needs (Figure 44). Once finished you can click on the **Close Form** button.
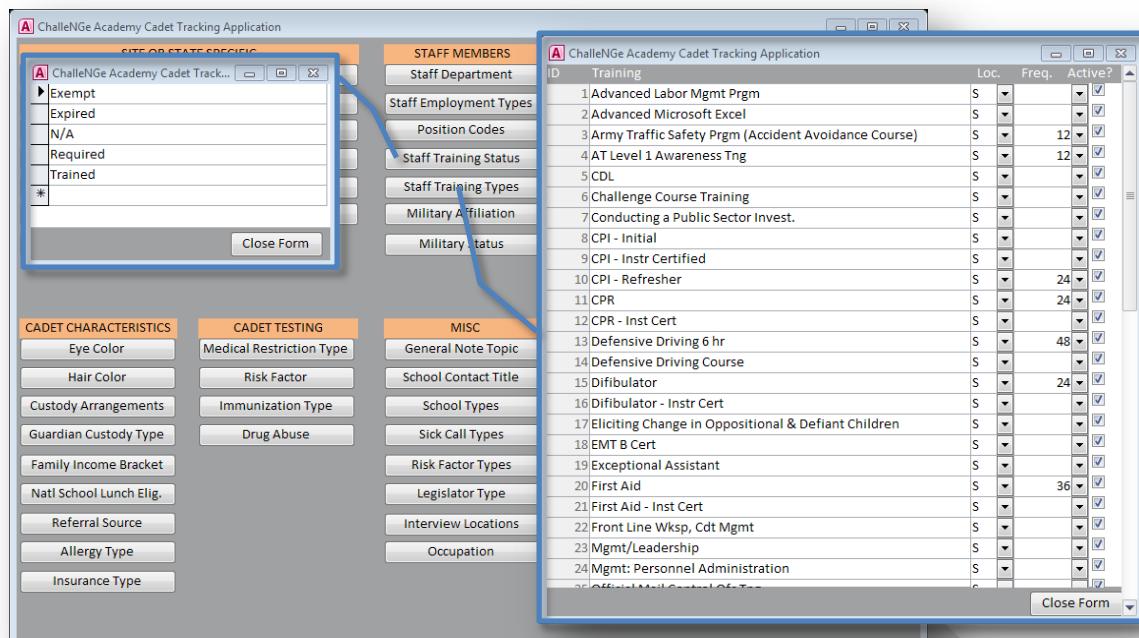
Figure 43

Figure 44

Cadet Applications

This section will walk you step-by-step through the process of creating a new cadet file and saving it to a specific class.

1. When you open the database you may see the following prompt. If so click on the "**Stop All Macros**" button (Figure 45).
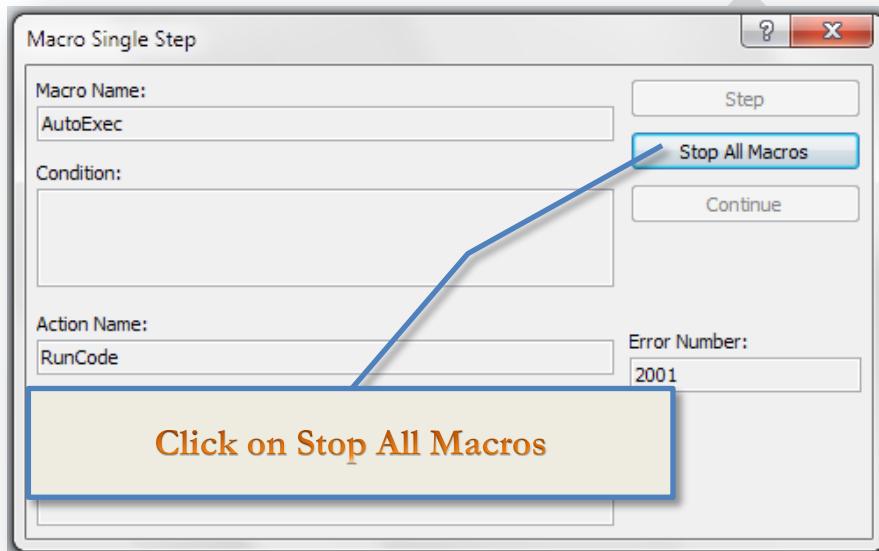

Figure 45

2. If prompted you will need to click on "**Enable Content**" (Figure 46). This prompt may also read "Choose Details."
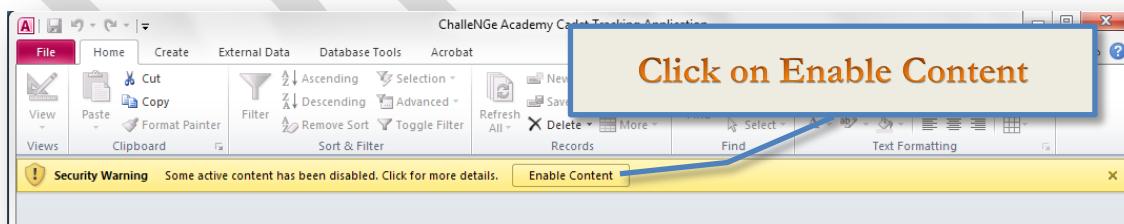
Figure 46

3. You may also see the following message. If you do click "**Yes**" (Figure 47).

Do you want to make this file a Trusted Document?

This file is on a network location. Other users who have access to this network location may be able to tamper with this file.

What's the risk?

☐ Do not ask me again for network files

Yes   No

Click on Yes

<div align="right">Figure 47</div>

4. To start a new Cadet Application you will need to click on the **Cadet Application** button (Figure 48). You will need to enter a first and last name as well as either a phone number or address in order to save the applicants information to the system.

Click on Cadet Application
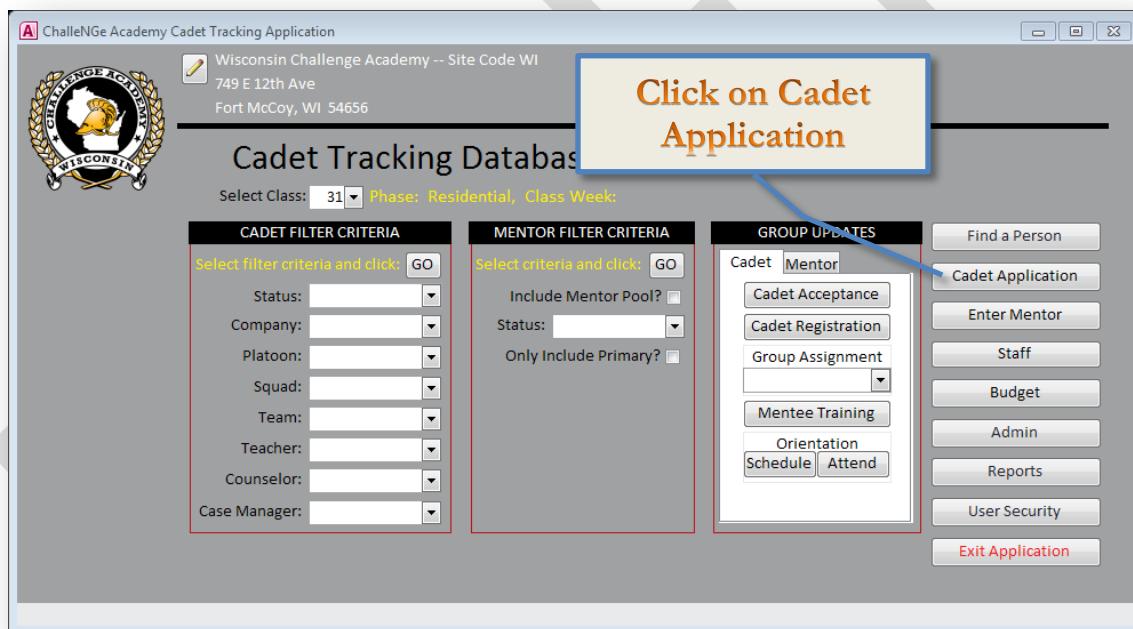
<div align="right">Figure 48</div>

Cadet Applications (Continued)

A ChalleNGe Academy Cadet Tracking Application

Select Class: [▼]   START NEW RECORD

NAME and VITAL STATISTICS

SSN   Last Name   Salutation   First   Middle   Gen. Qual.   Person Type   Added
                                                                    Cadet ▼   5/27/2013

4. Enter a street address and zip code

ADDRESS INFORMATION   (Physical)   (Mailing)

Address: ▶   Address:
Address2:   ◀
City, ST Zip: City, ST Zip:

(NOTE: To propagate the same data for physical and mailing address, you can use the right and left arrows to copy one to the other.)

CONTACT INFORMATION   **LOCATION**

Email: County: [▼]
Phone Numbers   Zone:
PHONE NUMBER EXT   TYPE   DESCRIPTION   Region:
▶   [▼]   Urbanization:

                                            DEMOGRAPHICS

                                            Birth Date   Current Age   Gender
                                                                        [▼]

                                            For ethnicity, is this person Hispanic? ☐
                                            Race Identification
Record: ◄ ◄ 1 of 1 ► ►I ► No Filter Search   RACE
NOTES or ADDITIONAL INFORMATION   ▶   [▼]

                    Add this Person   Close Form

Record: ◄ ◄ 1 of 1 ► ►I ► No Filter Search

Cadet Applications (Continued)

NOTE: By default, only classes in Application phase will be listed in the 'Select Class' pulldown but a 'superuser' has the ability to enter a cadet in ANY class. (This feature could be used for testing, as well as for populating historical data.)

A ChalleNGe Academy Cadet Tracking Application

Select Class: [▼]   START NEW RECORD

1. Select a class

2. Enter SSN   *(NOTE: If the cadet had applied in a previous class, all existing data fields would automatically populate based on the last record. Edits would be made as necessary.*

NAME and VITAL STATISTICS

SSN   Last Name   Salutation   First   Middle   Gen. Qual.   Person Type   Added
                                                                    Cadet ▼   5/27/2013

ADDRESS INFORMATION   (Physical)   (Mailing)

Address: ▶   Address:
Address2:   ◀   Address2:
City, ST Zip: City, ST Zip:

CONTACT INFORMATION   **LOCATION**

Email: County: [▼]
Phone Numbers   Zone:
PHONE NUMBER EXT   TYPE   DESCRIPTION   Region:
▶   [▼]   Urbanization:

                                            DEMOGRAPHICS

                                            Birth Date   Current Age   Gender
                                                                        [▼]

                                            For ethnicity, is this person Hispanic? ☐
                                            Race Identification
Record: ◄ ◄ 1 of 1 ► ►I ► No Filter Search   RACE
NOTES or ADDITIONAL INFORMATION   ▶   [▼]

                    Add this Person   Close Form

Record: ◄ ◄ 1 of 1 ► ►I ► No Filter Search

Cadet Applications (Continued)

5. Enter contact and location information if known.

(NOTE: All cadet applications require an address, but for other person types only one of the following is required: address, phone, or email.)

Cadet Applications (Continued)

6. Enter date of birth

(NOTE: The current age will be populated automatically based on the date of birth.)

7. Enter gender.

Cadet Applications (Continued)

8. Check if Hispanic

(NOTE: The cadet can be of Hispanic ethnicity regardless of race.)

Cadet Applications (Continued)

(NOTE: The races displayed in the pulldown are taken from the most recent census form and should not be edited until the next census update. For reporting purposes, if only one race is provided, that will be the one reported. If more than one is chosen, 'Multiracial' will be reported.)

9. Select as many races as apply

Cadet Applications (Continued)

(NOTE: This screen shot shows sample data to be added.)

10. Enter any notes, if applicable.

11. Click 'Add this Person'

(NOTE: If any required fields were not provided, the user would be notified.)

Cadet Applications (Information)

(NOTE: After a cadet is added to a particular class, the 'Class Detail' screen will be displayed. It will begin on the 'Information' tab with data that was entered on the previous screen already populated.)

To continue, you would enter data in the following sections, if available or applicable.

12. Referral Information

13. Basic Data

14. Court Assignments

Cadet Applications (Enrollment)

15. Click Enrollment tab

16. Enter Application Sent and/or Application Submitted Date(s)

17. Provide an Entered Date and Entered By corresponding to the person entering the application

(NOTE: The enrollment address will be populated based on the physical address entered in step 4. This address is stored separately from the physical and mailing addresses displayed in the 'person header' (blue band at the top), as the enrollment address will be based on each class enrollment and the person header will be the current contact information which may be updated over time.)

Cadet Applications (Enrollment, Cont'd)

18. Select legislators

(NOTE: If this is not populated automatically with initial entry of enrollment address, then select the appropriate legislators from the pulldown. The list of legislators is maintained on the admin menu.)

19. Enter data in the FAMILY LIFE section as able or applicable.

20. Enter any known allergies, indicate if health insurance is provided and provide a medicaid #, if applicable.

21. Enter insurance coverage and policy information, if provided.

Cadet Applications (Enrollment, Cont'd)

22. Enter as many details of appearance as known

(NOTE: Height is stored as a number of inches, but the separate pulldowns for 'feet' and 'inches' can be used to calculate the stored value.)

(NOTE: If you keep digital images of the cadets and would like it to appear in the upper right corner of this screen and also on certain printed reports, click the folder icon to select the stored path to the cadet image file.)

23. Enter risk factors, if applicable

24. Enter schooling and educational background, as known or applicable.

Cadet Applications (Guardians)

25. Click Guardians tab

26. Click Add Guardian

Cadet Applications (Guardians, Cont'd)

(NOTE: When adding a guardian for a cadet, the two fields indicated with yellow arrows will be pre-populated based on the added cadet. They should not be changed.)

27. Repeat steps 2 – 11, filling in as much information as is known about the guardian.

(NOTE: If the last name is the same as the cadet's, a 'match' on last name will be found, but it is likely just the cadet. However, take note of any matches because it is possible that the guardian is already in the system, either for a rollover cadet or for another another unrelated cadet.)

(NOTE: All cadet applications require an address, but for other person types only one of the following is required: address, phone, or email.)

28. Click Add this Person

Cadet Applications (Guardians, Cont'd)

(NOTE: After the guardian is added but before the Guardian tab is loaded, a reminder message will appear.)

29. Click OK

Microsoft Office Access

Please check the appropriate boxes on the guardian form.

OK

Cadet Applications (Guardians, Cont'd)

(NOTE: Now the cadet's class detail page is refreshed with the guardian data added.)

30. Populate the GUARDIANS section as thoroughly as possible.

(NOTE: This information will be displayed on the Emergency Contacts report. If you had entered phone numbers in the previous step, they would be displayed below. If not, they can still be added now, or as that information is provided later.)

31. Repeat steps 26 – 30 for each of the guardians and emergency contacts listed on the application.

Cadet Applications (Mentors)

32. Click Mentors tab

33. Click Add Mentor

Cadet Applications (Mentors, Cont'd)

(NOTE: A mentor can be added directly with a cadet application, or individually. For the purpose of this exercise, you will see the screen shot shows the pre-populated class and cadet with yellow arrows. They should not be changed.)

34. Repeat steps 2 – 11, filling in as much information as is known about the mentor.

(NOTE: All cadet applications require an address, but for other person types only one of the following is required: address, phone, or email.)

35. Click Add this Person

Cadet Applications (Mentors, Cont'd)

36. Populate the ADDITIONAL MENTOR INFORMATION section with Drivers License # and expiration, if known.

(NOTE: This is the mentor's primary screen, for information about the mentor regardless of the cadet and class. There is a section called CADET MENTORSHIPS which will be populated once a mentor and cadet are matched.)

37. Click Close Form

Cadet Applications (Mentors, Cont'd)

(NOTE: At this point, focus returns to the cadet's Class Detail screen, with the added mentor shown.)

38. Populate the MENTOR section as thoroughly as possible.

39. Repeat steps 33 – 38 for each of the possible mentors provided.

Cadet Applications (Group Assignments)

NOTE: If your site groups cadets (into platoons, squads, teams, etc.) during the application process, continue with steps 40 – 50, otherwise, skip to step 51.

40. Click on the Residential tab

41. Within the tabs under that, click on Groups

Cadet Applications (Group Assignments)

NOTE: Select any/all desired means of grouping cadets. This grouping can be done individually at this time, or done in bulk at a later time with the 'Group Update' feature.

42. Select Company

43. Select Platoon

44. Select Squad

45. Select Team

46. Select Building

47. Select Room

48. Select Teacher

49. Select Counselor

50. Select Case Manager

51. Click Close Form

Appendix 1

Use of Templates

- These templates will be used to import pertinent program and class data into the Cadet Tracking database.

- It is imperative that template files be kept well organized so that accidental overwrite of data does not occur.

Down Load Templates

In your browser go to
http://www.challengeacademy.org/secure/

Windows Security

The server www.challengeacademy.org at restricted area requires a username and password.

Warning: This server is requesting that your username and password be sent in an insecure manner (basic authentication without a secure connection).

User name wica
Password Academy1
Remember my credentials

OK   Cancel

Down Load and save the following files

```
[?]  Cadet Tracking Templ..>  09-Aug-2013 06:58   16K
[?]  Cadet Tracking Templ..>  09-Aug-2013 06:58   17K
[?]  NGCA Template .accdb      09-Aug-2013 06:58   2.1M
```

Use of Templates

- The two excel files are the templates programs will use to copy all data into so it can be imported into the database.
- Once all data has been copied into the templates, use the access file to validate and import to the database.
- These are for one time use only. Once data has been imported, importing to the same class to "Update data" will cause duplicates.

Cadet Tracking Template .xlsx

- This template will be used to import Class specific data. Read the Notes work sheet <u>first.</u>
- There are several items that require specific text such as Race. These items are listed in the notes.
- Make one template per class. Save your template by class number.

Cadet Tracking Template - Extras .xlsx

- This file will be used to import all program type data and Mentors that are in the Mentor Pool that have no Cadet association. Do not list mentors that are loaded in the other file with cadets, this will duplicate the mentor.
- Notes work sheet has required text listed. i.e. EMPLOYMENT OBJECT CODE: Refer to Challenge Budget for a listing of these positions.

NGCA_Template .accdb

- This file is used to verify/validate data and import into the database.

Using access Template

Click here and browse to excel template file

Choose the path for the Excel data template.
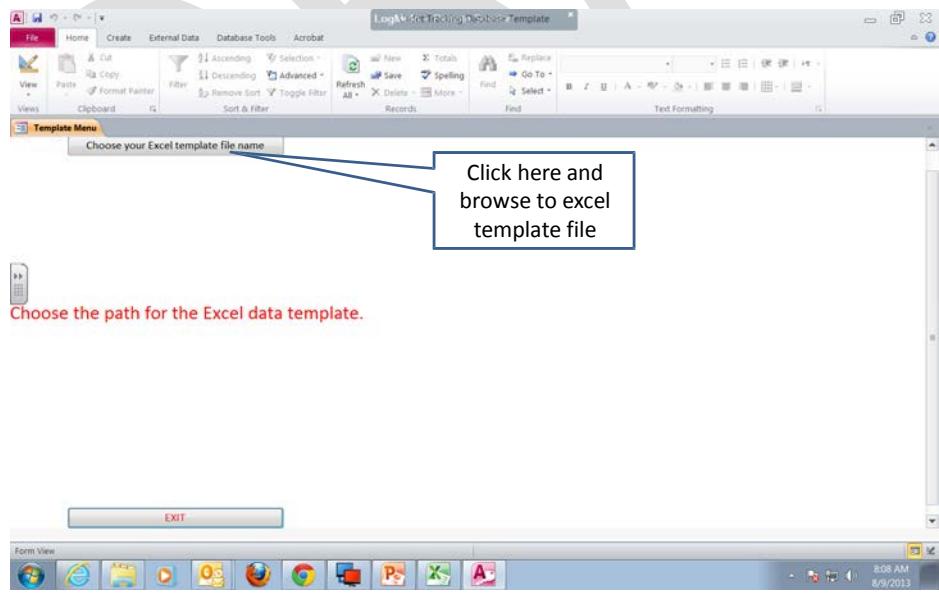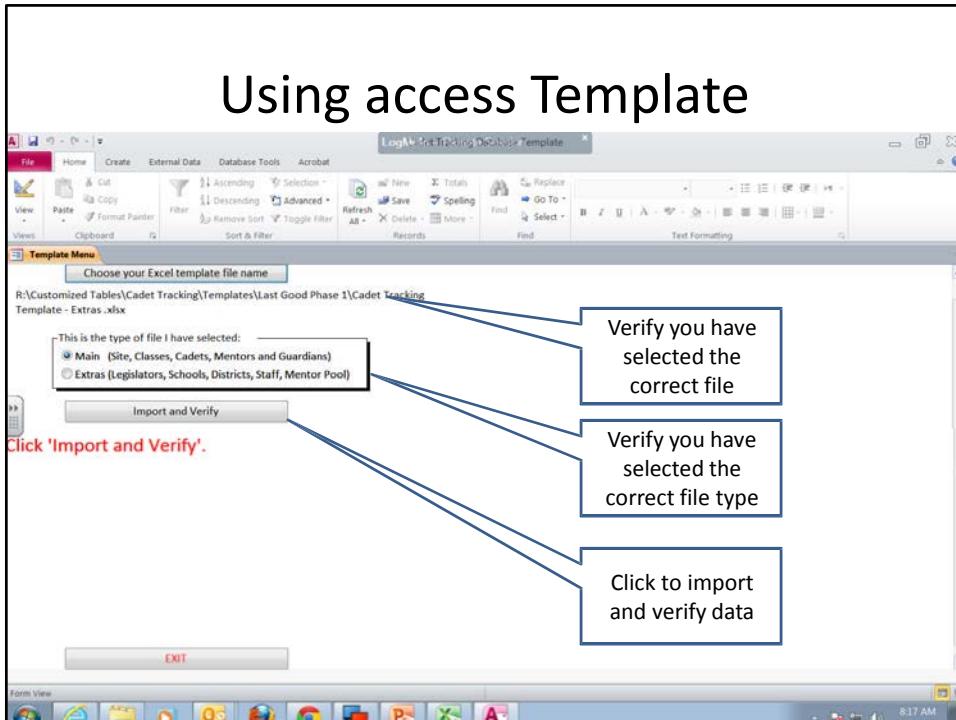
Using access Template

- During verification process the program will stop on any errors. You must fix the error and restart verification process.
- Once all data has been verified you will receive this message. This lets you know that you have all required data and are ready to import.

Using access Template

Choose your Excel template file name

R:\Customized Tables\Cadet Tracking\Templates\Last Good Phase 1\Cadet Trackin Template .xlsx

This is the type of file I have selected:
- ● Main (Site, Classes, Cadets, Mentors and Guardians)
- ○ Extras (Legislators, Schools, Districts, Staff, Mentor Pool)

Import and Verify

Select the path to the backend database.

Click here and browse to
NGCA_Data.accdb
If you have not received the database yet stop here. Once you receive the database you can continue.

Choose your backend database name

EXIT

Using access Template

Confirm that the path displayed is to the empty/stripped copy of the backend database and then click 'Export to Access'.

R:\Customized Tables\Cadet Tracking\Backend\NGCA_Data.accdb

Verify you have selected the correct file and then click here to import. Once you have imported and verified data then repeat the same process for additional classes importing into the same database.

Useful Tips

- Do not change the column header in the template.
- Use of split view in excel is very useful when coping data.
- All columns in color require data. If some of this data is unknown enter UNK as a place holder. Or for numbers enter a fictitious number in the required format. I.E. telephone 100-001-0000. Use something that will be recognized as being a place holder only.

Useful Tips

- Once you have the templates ready have someone else help you verify that the data is correct and in the correct order. It is easy to get rows out of line in excel and this will skew all your data. i.e. mentors not lined up, then all cadets will have the wrong mentor in the database.
- Verify, verify and then verify that all data elements are correct.

Useful Tips

- When using the access template to import keep the excel file you are importing open to make quick corrections to if needed. Make sure to save after any changes are made.

- Always keep a clean back copy of the templates and database.

- Once you have imported a class to the database save a back-up copy.

- Use reports in the database to help verify data before importing the next class.

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